1. **Headlines**
   - There were 11.5 million domestic overnight trips in Great Britain in June, a 2% increase from 11.3 million in 2011.
   - Spend increased by 6% on the same period last year, rising to £2.3 million, however, the number of bed nights fell by 1%.
   - A more pronounced pattern emerged in England, with trips up 4% (rising from 9.2 million in 2011 to 9.5 million in 2012), spend up 13% and nights flat.
   - In the year to date, the number of trips in Great Britain has declined by 3%. Nights have also declined (-7%); however, spend has increased so far this year, by 4%.
   - Looking at the past 12 months, there were 7.6 million more trips taken in Great Britain compared with the same period the year before, an increase of 7%.

2. **Context**
   - The Diamond Jubilee bank holiday (and accompanying celebrations) took place at the beginning of June this year, which added an additional holiday onto the existing spring bank holiday. There were no bank holidays in June 2011.
   - Although we would have expected to see a strong boost in trips, nights and spend as a result of the four day weekend, June 2012 was the wettest June since records began in 1910, with double the average amount of rain falling during the month.

3. **Trip Characteristics**
   - Between January and June 2012, the number of holiday trips in Great Britain decreased by 4%, from 25.5 million to 24.6 million, with nights falling by 9% and spend remaining flat.
   - The number of short holiday breaks has held steady (+1%), however, a 12% decline in the number of 4+ night breaks has impacted the total volume of holiday nights.
   - The number of trips to visit friends and relatives (VFR) has also decreased so far this year (-6%), as has the volume of VFR nights (-8%), with spend remaining flat.
   - However, the number of business trips increased between January and June (by 8%), as did business nights (+14%) and spend (+13%). Perhaps linked to this, large towns / cities are the only destination type to see an increase in trip volumes (+2%).
   - The steepest decline in trip taking is in the least affluent DE social grade group (-7%). Those with children are also taking fewer trips, down 7% since January this year.

4. **Overseas Travel by UK Residents**
   - Trips abroad by UK residents increased in June 2012 (by 9%), likely to be a reflection of the extra bank holiday. Spend also increased, by 6%. For the year to June, trips abroad were flat while spend was slightly up (by 2%).

5. **Other Tourism Surveys**
   - VisitEngland’s Tourism Business Monitor for May and early June showed that year-to-date, 46% of accommodation providers had less visitors than over the same period in 2011. The picture among attractions was more mixed, with while 39% reporting less visitors, and 42% reporting an increase.
   - England Occupancy June saw a slight decrease in room occupancy levels compared with June 2011 whilst bed occupancy rose slightly during the same period.
### Year on Year Comparison – All Trips

<table>
<thead>
<tr>
<th></th>
<th>TRIPS (MILLIONS)</th>
<th>NIGHTS (MILLIONS)</th>
<th>SPEND (£M)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2011</td>
<td>2012</td>
<td>% +/-</td>
</tr>
<tr>
<td>June '12</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GB</td>
<td>11.3</td>
<td>11.5</td>
<td>+2%</td>
</tr>
<tr>
<td>England</td>
<td>9.2</td>
<td>9.5</td>
<td>+4%</td>
</tr>
<tr>
<td>Jan-June'12</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GB</td>
<td>56.2</td>
<td>54.7</td>
<td>-3%</td>
</tr>
<tr>
<td>England</td>
<td>46.4</td>
<td>45.4</td>
<td>-2%</td>
</tr>
</tbody>
</table>

### Purpose of Trip – June 2012

<table>
<thead>
<tr>
<th></th>
<th>TRIPS (MILLIONS)</th>
<th>NIGHTS (MILLIONS)</th>
<th>SPEND (£M)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2011</td>
<td>2012</td>
<td>% +/-</td>
</tr>
<tr>
<td>GB</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Holiday</td>
<td>5.8</td>
<td>6.0</td>
<td>+3%</td>
</tr>
<tr>
<td>Business</td>
<td>1.7</td>
<td>1.7</td>
<td>+2%</td>
</tr>
<tr>
<td>VFR</td>
<td>3.4</td>
<td>3.6</td>
<td>+5%</td>
</tr>
<tr>
<td>England</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Holiday</td>
<td>4.5</td>
<td>4.7</td>
<td>+5%</td>
</tr>
<tr>
<td>Business</td>
<td>1.4</td>
<td>1.5</td>
<td>+6%</td>
</tr>
<tr>
<td>VFR</td>
<td>2.9</td>
<td>3.1</td>
<td>+7%</td>
</tr>
</tbody>
</table>

### Purpose of Trip – Year to Date (January – June 2012)

<table>
<thead>
<tr>
<th></th>
<th>TRIPS (MILLIONS)</th>
<th>NIGHTS (MILLIONS)</th>
<th>SPEND (£M)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2011</td>
<td>2012</td>
<td>% +/-</td>
</tr>
<tr>
<td>GB</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Holiday</td>
<td>25.5</td>
<td>24.6</td>
<td>-4%</td>
</tr>
<tr>
<td>Business</td>
<td>8.7</td>
<td>9.4</td>
<td>+8%</td>
</tr>
<tr>
<td>VFR</td>
<td>20.0</td>
<td>18.7</td>
<td>-6%</td>
</tr>
<tr>
<td>England</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Holiday</td>
<td>20.0</td>
<td>19.4</td>
<td>-3%</td>
</tr>
<tr>
<td>Business</td>
<td>7.4</td>
<td>7.9</td>
<td>+7%</td>
</tr>
<tr>
<td>VFR</td>
<td>17.3</td>
<td>16.3</td>
<td>-6%</td>
</tr>
</tbody>
</table>

### Outbound Travel – UK Residents

<table>
<thead>
<tr>
<th></th>
<th>TRIPS (MILLIONS)</th>
<th>SPEND (£BN)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>2011</td>
<td>2012</td>
</tr>
<tr>
<td>June</td>
<td>5.6</td>
<td>6.1</td>
</tr>
<tr>
<td>January-June</td>
<td>25.9</td>
<td>25.9</td>
</tr>
<tr>
<td>July ’11 – June ’12</td>
<td>56.7</td>
<td>56.8</td>
</tr>
</tbody>
</table>
TREND CHARTS

GB All Trips – Domestic Trip Volume by Month

GB All Trips - Annual Percentage Change
Year on Year Comparison, by Trip Characteristic

Important Note

The analysis on the following page shows year-on-year comparisons across a number of trip characteristics, considering:

- Month (June 2011 vs. June 2012)
- Year to date (January–June 2011 vs. January–June 2012)

Percentage changes are colour coded:
Green indicates a change of over 5 percentage points better than the average across all trips (so a drop of -4% would be shaded green if all trips had declined by 10% over the same period
Yellow indicates a change of within +/- 5 percentage points of the average
Orange indicates a change of more than 5 percentage points worse than the average

This analysis does not necessarily indicate differences that are statistically significant. For many of the categories included, particularly when reviewing single month data, changes would need to be much larger than the +/-5% cut-off point used to be statistically significant, and should always be reviewed in the context of the longer term trends. Even so, we feel that this analysis is helpful in understanding some of the market dynamics behind the overall monthly figures.

Sample sizes (underlying numbers of trips) are indicated on the spreadsheet – those with a very low base (fewer than 75 trips) have been “greyed out” to highlight that results should be treated with caution.
### GBTS: Comparisons with equivalent periods, 2011

**YEAR-ON-YEAR COMPARISON, BY TRIP CHARACTERISTIC**

<table>
<thead>
<tr>
<th>Location Type</th>
<th>Month: June 2012</th>
<th>Unweighted</th>
<th>GBTS: Comparisons with equivalent periods, 2011</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Purpose</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pure holiday</td>
<td>2.8%</td>
<td>0.6%</td>
<td>6.0%</td>
</tr>
<tr>
<td>1-3 nights holiday</td>
<td>0.6%</td>
<td>1.5%</td>
<td>4.4%</td>
</tr>
<tr>
<td>4- nights holiday</td>
<td>3.2%</td>
<td>2.5%</td>
<td>10.2%</td>
</tr>
<tr>
<td>HFR (total)</td>
<td>-1.1%</td>
<td>2.0%</td>
<td>3.2%</td>
</tr>
<tr>
<td>HFR (non tourist)</td>
<td>2.0%</td>
<td>-1.4%</td>
<td>5.8%</td>
</tr>
<tr>
<td>Visitor (on holiday)</td>
<td>1.5%</td>
<td>-0.7%</td>
<td>2.0%</td>
</tr>
<tr>
<td>Visitor (off holiday)</td>
<td>3.2%</td>
<td>5.8%</td>
<td>10.4%</td>
</tr>
<tr>
<td>Business</td>
<td>1.5%</td>
<td>1.6%</td>
<td>7.0%</td>
</tr>
<tr>
<td><strong>Location</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>West Midlands</td>
<td>-15.3%</td>
<td>-3.4%</td>
<td>-1.1%</td>
</tr>
<tr>
<td>East of England</td>
<td>2.7%</td>
<td>7.0%</td>
<td>8.4%</td>
</tr>
<tr>
<td>East Midlands</td>
<td>-0.1%</td>
<td>4.4%</td>
<td>1.6%</td>
</tr>
<tr>
<td>London</td>
<td>1.4%</td>
<td>-0.7%</td>
<td>8.7%</td>
</tr>
<tr>
<td>North West</td>
<td>7.0%</td>
<td>10.5%</td>
<td>17.0%</td>
</tr>
<tr>
<td>North East</td>
<td>9.1%</td>
<td>1.4%</td>
<td>9.0%</td>
</tr>
<tr>
<td>South East</td>
<td>4.1%</td>
<td>21.5%</td>
<td>1.1%</td>
</tr>
<tr>
<td>Yorkshire &amp; Humbers</td>
<td>2.9%</td>
<td>14.5%</td>
<td>27.8%</td>
</tr>
<tr>
<td><strong>Location</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Coastal</td>
<td>3.2%</td>
<td>14.5%</td>
<td>-2.3%</td>
</tr>
<tr>
<td>Large city/ town</td>
<td>15.7%</td>
<td>31.5%</td>
<td>17.2%</td>
</tr>
<tr>
<td>Rural</td>
<td>-0.5%</td>
<td>19.9%</td>
<td>19.7%</td>
</tr>
<tr>
<td>Country / village</td>
<td>-1.1%</td>
<td>0.5%</td>
<td>-1.6%</td>
</tr>
<tr>
<td><strong>SEG</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>A</td>
<td>2.7%</td>
<td>1.2%</td>
<td>8.0%</td>
</tr>
<tr>
<td>C1</td>
<td>2.1%</td>
<td>0.9%</td>
<td>-1.9%</td>
</tr>
<tr>
<td>C2</td>
<td>-0.4%</td>
<td>0.6%</td>
<td>-1.4%</td>
</tr>
<tr>
<td>D</td>
<td>-1.5%</td>
<td>-0.7%</td>
<td>-1.7%</td>
</tr>
<tr>
<td><strong>Children Born</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Boy</td>
<td>4.1%</td>
<td>1.3%</td>
<td>5.9%</td>
</tr>
<tr>
<td>Girl</td>
<td>0.2%</td>
<td>-1.4%</td>
<td>0.3%</td>
</tr>
<tr>
<td><strong>Accommodation</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Commercial</td>
<td>3.6%</td>
<td>0.5%</td>
<td>6.7%</td>
</tr>
<tr>
<td>Serviced accommodation</td>
<td>10.6%</td>
<td>1.2%</td>
<td>12.6%</td>
</tr>
<tr>
<td>Hotel/motel/inn/outside</td>
<td>15.8%</td>
<td>2.5%</td>
<td>13.1%</td>
</tr>
<tr>
<td>Bed &amp; Breakfast</td>
<td>21.2%</td>
<td>6.1%</td>
<td>14.1%</td>
</tr>
<tr>
<td>Total self-catering</td>
<td>2.5%</td>
<td>3.6%</td>
<td>11.6%</td>
</tr>
<tr>
<td>Other self-catering</td>
<td>2.0%</td>
<td>-2.6%</td>
<td>2.9%</td>
</tr>
<tr>
<td>Hostels</td>
<td>106.0%</td>
<td>2.3%</td>
<td>8.9%</td>
</tr>
<tr>
<td>Other homes/ friends/ relatives</td>
<td>3.7%</td>
<td>-2.5%</td>
<td>11.7%</td>
</tr>
</tbody>
</table>

**LEGEND:**
- Above Average: Marked in green.
- Average: Marked in blue.
- Below Average: Marked in red.

**NOTE:** The indicators, average performance refers to the month to month comparison in all the major areas of the report. These indicators measure average performance in each sector, where the change in average performance is more than 2% from the previous month. The average performance of each sector is used to calculate the average performance of the whole country. Changes are shown as percentage change. The values of unweighted trips are also displayed, where sample sizes are too small to be reliable. Where there is no change, performance is the same as the previous month. The number of change figures may be different to the number of tables used as not all tables are updated with each update.